



# JOB AID:

## Form 6729, *Site Review Sheet*

**Purpose:** SPEC uses Form 6729, *Site Review Sheet*, to measure site adherence to the Quality Site Requirements (QSR) and Volunteer Standards of Conduct (VSC), monitor site operations, and identify trends.

Instructions: Use this job aid to complete Form 6729.

For additional information, refer to:

- ▶ IRM 22.30.1, Stakeholder Partnerships, Education and Communication
- ▶ Publication 4299, *Privacy and Confidentiality - A Public Trust*
- ▶ Publication 3189, *Volunteer e-file Administration Guide*
- ▶ [www.irs.gov](http://www.irs.gov)
- ▶ Publication 1084, *IRS Volunteer Site Coordinator's Handbook*
- ▶ Publication 4012, *VITA/TCE Volunteer Resource Guide*
- ▶ Publication 5166, *Quality Site Requirements*
- ▶ Volunteer Tax Alerts (VTA), AARP Cyber Tax Messages (ACTM), and Quality Site Requirement Alerts (QSRA)

**Note:** The term “coordinator” includes both site coordinators and local coordinators. Confirm the information provided by the coordinator with what you observe at the site. Clarify the site’s processes and/or procedures when there is an inconsistency between what the coordinator tells you and what you observe. Ensure your answers to the questions below reflect any inconsistencies identified. You will need to examine the site’s documentation. Oral testimony is only acceptable if you are unable to observe a specific process.

When the site is not in compliance, explain to the partner/coordinator the importance and purpose of the QSR. Determine what corrective actions are needed and assist the site with these actions, when appropriate. Each question has a comments field for notes and corrective actions taken. If you need additional room, use the Remarks field located at the end of Form 6729. All underlined responses require a comment. Do not enter any Personally Identifiable Information (PII) information.

Responses to the measurement questions, shown in bold print, are used to measure adherence to the QSR. Each QSR has one measurement question. Rate the site’s adherence to the QSR based on the percentage of QSR the site met. If the site met all QSR, rate the site at 100%; if the site met 9 QSR, rate the site at 90%, etc.

**Note:** The SPECTRM generated Form 6729 will show the overall percent of QSR at the top of the form.

**Entity Section:** Complete these fields based on the options provided.

**Note:** Enter Form 6729 into the SPECTRM Site Quality Module BEFORE entering Forms 6729-C, 6729-R, or 6729-B. Do not enter partner reviews into the SQM.

## Quality Site Requirement #1: Certification

Question 1 <i>Are all volunteers certified in Volunteer Standards of Conduct?</i>	Answer Options
<p>The coordinator should be able to explain the process used to confirm volunteers are certified. Confirm ALL volunteers at the site have successfully completed VSC training.</p> <p>Use the following documents to confirm VSC certification:</p> <ul style="list-style-type: none"> <li>- Forms 13615</li> <li>- Form 13206</li> <li>- or similar partner-created list containing the same information as Form 13206</li> </ul> <p>If these records are not maintained at the site, you will need to request the information from the partner. Give the partner/coordinator two business days to respond. If the partner/coordinator does not respond or cannot provide all the information requested within two business days, answer No-unable to verify.</p> <p><b>If you answer no to this question, you MUST answer no to question 4.</b></p>	<p>Yes</p> <p><u>No</u> <u>not certified</u></p> <p><u>No</u> <u>unable to verify</u></p>

Question 2 <i>Is there a process to confirm volunteers completed Intake/Interview and Quality Review Training, when required?</i>	Answer Options
<p>Have the coordinator explain the process they use to ensure volunteers, quality reviewers, coordinators have completed the Intake/Interview and Quality Review Training. Remember, you are asking about the process used; not confirming every volunteer took this training.</p> <p>Have the coordinator describe how volunteers completed the Intake/Interview and Quality Review Training. The coordinator should be able to explain that the IRS Intake/Interview and Quality Review Training was included in the volunteer's tax law certification.</p> <p><b>Note:</b> The check box on Form 13615 for the Intake/Interview and Quality Review PowerPoint Training was added for the partner's convenience when using Form 6744 to certify their volunteers. The box may not be checked if the volunteer certified through classroom training.</p> <p><b>If you answer no to this question, you MUST answer no to question 4.</b></p>	<p>Yes</p> <p><u>No</u></p> <p>N/A FSA Only Site</p>

Question 3 <i>Are all volunteers who address tax law issues certified in tax law?</i>	Answer Options
<p>Have the coordinator explain the process they use to ensure all volunteers who answer tax law questions, prepare or correct tax returns, and/or conduct quality reviews are certified in tax law, including their level of certification. The process described by the coordinator should include how they confirm the volunteer's level of tax law certification.</p> <p>AARP certifies their volunteers in a few tax law topics which are not included in the VITA/TCE Programs tax law certification paths. <i>Quality Site Requirements (QSR) for AARP Policy</i> lists these additional tax law topics. If the volunteers are certified through AARP training, they received certification in these additional tax law topics.</p> <p>If these records are not maintained at the site, request the information from the partner. Give the coordinator two business days to respond. If the partner/coordinator does not respond or cannot provide all the information requested within two business days, answer No-unable to verify.</p> <p><b>If you answer no to this question, you MUST answer no to question 4.</b></p>	<p>Yes</p> <p><u>No</u> <u>not certified</u></p> <p><u>No</u> <u>unable to verify</u></p>

Question 4 <b>Did the site meet the components for QSR #1?</b>	Answer Options
<p><b>This is the measurement question.</b></p> <p>Answer Yes if:</p> <ul style="list-style-type: none"> <li>-You were able to verify all volunteers were certified in VSC (Q1), AND</li> <li>- You were able to verify all volunteers completed Intake/Interview and Quality Review Training (Q2), AND</li> <li>- You were able to confirm all volunteers who address tax issues are certified in tax law (Q3).</li> </ul> <p>Answer No if:</p> <ul style="list-style-type: none"> <li>- You were NOT able to verify all volunteers were certified in VSC (Q1), OR</li> <li>- You were NOT able to verify all volunteers completed Intake/Interview and Quality Review Training (Q2) OR</li> <li>- You were NOT able to confirm all volunteers who address tax issues are certified in tax law (Q3).</li> </ul>	<p>Yes</p> <p><b><u>No</u></b></p>

Question 5 <b>Did the coordinator complete site/local coordinator training?</b>	Answer Options
<p>Identify the coordinator(s) for the site. Once the coordinator is identified, ask if the coordinator has completed site coordinator or local coordinator training prior to the site opening. You may be able to verify this in SPECTRM before your visit by checking the information in the Contacts Module. If the information was not already entered into SPECTRM, confirm how and when the coordinator attended site or local coordinator training while you are at the site.</p> <p>Note: Site Coordinator Training should include a review of Publications 1084, <i>Site Coordinator's Handbook</i>, and 5088, <i>Site Coordinator Training Powerpoint</i>. Publication 1084 is available electronically. Publication 5088 is available through Link &amp; Learn.</p>	<p>Yes</p> <p><u>No</u></p> <p>N/A FSA Only Site</p>

## Quality Site Requirement #2: Intake and Interview Process

Question 6 <i>Are out-of-scope returns prepared at the site?</i>	Answer Options
<p>See Publication 4012's Scope of Service Chart. Refer to the AARP Scope of Service Chart and/or Quality Site Requirements (QSR) for AARP policy to determine what issues will be prepared at AARP sites.</p> <p>Only use the FSA Only Site answer option if the FSA site has no volunteers and/or provides no volunteer assistance. If volunteers are available at the site, answer either Yes or No based on what you determine during the review.</p> <p>Enter all out-of-scope issues in the comments field.</p> <p><b>If you answer yes to this question, you MUST answer no to question 8.</b></p>	<p><u>Yes</u></p> <p>No</p> <p>N/A FSA Only Site</p>

Question 7 <i>Are all volunteers using a correct intake &amp; interview process for every return?</i>	Answer Options
<p>Have the coordinator walk you through the process the site uses from the time a taxpayer walks in the door until they leave with their tax return. The coordinator should cover all steps. If the coordinator does not include one of the necessary steps, you will need to ask them about it.</p> <p>Have the coordinator explain the process used to confirm taxpayer identities using photo identification and TINs using appropriate documentation. Refer to Publication 4299 for more information.</p> <p>Prior year returns can be included in FSV return reviews. Prior year returns must be prepared using the current version of IRS Form 13614-C. See the Fact Sheet entitled <i>Preparing Prior Year and Amended Returns at VITA/TCE Sites</i> for more information.</p> <p>A return cannot be reviewed without a complete/correct Form 13614-C.</p> <p>Virtual VITA/TCE Sites must use Form 14446, <i>Virtual VITA/TCE Taxpayer Consent</i>. See the IRM for more information.</p> <p>See Publications 1084 and 5166 for more information about the intake/interview process.</p> <p><b>If you answer no to this question, you MUST answer no to question 8.</b></p> <p>Use N/A-FSA Only Site if the site only offers FSA.</p> <p>Use No - Not Using Form 14446 (<b>Virtual VITA/TCE Site</b>) if the Virtual VITA/TCE Site is not correctly using Form 14446. Form 6729 erroneously lists this as FSA Only Site when should be Virtual VITA/TCE Site.</p>	<p><u>Yes</u></p> <p><u>No</u> <u>Not using</u> <u>Form 13614-C</u></p> <p><u>No</u> <u>Not interviewing</u> <u>the taxpayer</u></p> <p><u>No</u> <u>Not verifying taxpayer (or</u> <u>spouse) identity</u></p> <p><u>No</u> <u>Not reviewing Form 13614-C</u></p> <p><u>No</u> <u>Not verifying taxpayer/</u> <u>dependent TINs</u></p> <p>No Not using Form 14446 (FSA Site)</p> <p><u>No</u> Other</p> <p>N/A FSA Only Site</p>

<b>Question 8</b> <b>Did the site meet the components for QSR #2?</b>	<b>Answer Options</b>
<p><b>This is the measurement question.</b></p> <p>Answer Yes if:</p> <ul style="list-style-type: none"> <li>- the site does not prepare any returns with issues that are out-of-scope for the VITA/TCE Programs (Q6) AND</li> <li>- the site follows all the necessary steps for the intake/interview process (Q7).</li> </ul> <p>Answer No if:</p> <ul style="list-style-type: none"> <li>- the site prepares a return with an issue which is out-of-scope for the VITA/TCE Programs (Q6) OR</li> <li>- the site does not follow all the necessary steps for the intake/interview process (Q7).</li> </ul>	<p>Yes</p> <p><b><u>No</u></b></p>

<b>Question 9</b> <b>Is there a process which ensures returns are within scope and volunteer preparers are assigned returns at their certification level?</b>	<b>Answer Options</b>
<p>The site should have a process for ensuring returns prepared at the site are within the scope of the VITA/TCE Programs and that volunteers have the appropriate certification for the returns they prepare. Have the coordinator explain how he/she ensures volunteers have the certification level needed for the returns they prepare.</p> <p>Answer No-Other if the site does not have a process for identifying out of scope returns AND does not have a process for ensuring volunteers are only preparing returns that are within their certification level.</p>	<p>Yes</p> <p><u>No</u></p> <p><u>Not identifying out-of-scope</u></p> <p><u>No</u></p> <p><u>Not identifying volunteer/</u> <u>return certification levels</u></p> <p><u>No</u></p> <p>Other</p> <p>N/A</p> <p>FSA Only Site</p>

### Quality Site Requirement #3: Quality Review Process

<b>Question 10</b> <i>Are quality reviewers using a correct quality review process for every return?</i>	<b>Answer Options</b>
<p>Have the coordinator walk you through the quality review process the site uses. The coordinator should cover all steps. If the coordinator does not include one of the necessary steps, you will need to ask them about it.</p> <p>See Publications 1084 and 5166 for more information about the quality review process.</p> <p><b>If you answer no to this question, you MUST answer no to question 12.</b></p>	<p>Yes</p> <p>No <u>Does not quality review all returns</u></p> <p>No <u>Incomplete quality review process</u></p> <p>No <u>Using an unapproved method</u></p> <p>No <u>Other</u></p> <p>N/A FSA Only Site</p>
<b>Question 11</b> <i>Are volunteers advising taxpayers of their responsibility for the information listed on their return?</i>	<b>Answer Options</b>
<p>Ask the coordinator to explain when/how volunteers advise taxpayers of their responsibility for the information on their tax return after quality review but before the taxpayer signs and dates the return. Answer yes if anyone advises the taxpayer, even if it is not the quality reviewer. The volunteer should:</p> <ul style="list-style-type: none"> <li>▶ Advise the taxpayer that he/she is ultimately responsible for the information on the return</li> <li>▶ Explain that by signing and dating Form 8879 or the return, the taxpayer(s) has confirmed that the information is accurate</li> </ul> <p>If the coordinator doesn't include these steps when describing their process, discuss the steps with them</p> <p><b>If you answer no to this question, you MUST answer no to question 12.</b></p>	<p>Yes</p> <p>No</p> <p>N/A FSA Only Site</p>
<b>Question 12</b> <b>Did the site meet the components for QSR #3?</b>	<b>Answer Options</b>
<p><b>This is the measurement question.</b></p> <p>Answer Yes if:</p> <ul style="list-style-type: none"> <li>- the site uses a correct quality review process (Q10) AND</li> <li>- the site advises taxpayers of their responsibility for the information listed on their return (Q11).</li> </ul> <p>Answer No if:</p> <ul style="list-style-type: none"> <li>- the site does not use a correct quality review process (Q10) OR</li> <li>- the site does not advise taxpayers of their responsibility for the information listed on their return (Q11).</li> </ul>	<p>Yes</p> <p>No</p>

<b>Question 13</b> Is there a process which ensures returns are within scope and quality reviewers are assigned returns at their certification level?	Answer Options
<p>Have the coordinator explain how he/she ensures the quality reviewers have the certification level needed for the returns they review.</p> <p>The site should have a process for ensuring returns prepared and reviewed at the site are within the scope of the VITA/TCE Programs and that reviewers only quality review returns within the scope of the VITA/TCE Programs and their level of certification. All out-of-scope issues should have been identified prior to the return being quality reviewed. The quality reviewer should also ensure the volunteer who prepared the return had the required certification level.</p>	<p>Yes</p> <p>No <u>Not identifying out of scope issues</u></p> <p>No <u>Not identifying reviewer/return certification level</u></p> <p>No <u>Other</u></p> <p>N/A FSA Only Site</p>

#### Quality Site Requirement #4: Reference Materials

<b>Question 14</b> Are all required reference materials available at the site?	Answer Options
<p>Check that the site has at least one copy of both Publications 4012 and 17 available. You may be able to see these at a workstation or a centralized area. If the site does not have paper copies available, have the coordinator demonstrate how they access them electronically, if appropriate. It is not sufficient for the coordinator to just say they access the publications electronically; they have to show you they can access them.</p> <p><b>This is the measurement question.</b> If you answered Yes, the site met this QSR. If you answered with one of the No answer options, the site did not meet this QSR.</p> <p>Use No-Other answer option when the site has neither publications available.</p>	<p>Yes</p> <p>No <b><u>Publication 4012 not available</u></b></p> <p>No <b><u>Publication 17 not available</u></b></p> <p>No <u>Other</u></p>

<b>Question 15</b> Is there a process which ensures all volunteer alerts are reviewed by all tax law certified volunteers?	Answer Options
<p>Have the coordinator explain the process they use to ensure all VTA and QSRA have been distributed and discussed with all volunteers within five to seven days of issuance. FSA Only Sites must also have all alerts available. Alerts are available on the TaxWise Solution Center and the Site Coordinator Corner page on irs.gov.</p> <p>If the review/visit is conducted prior to any alerts being issued, answer Yes.</p> <p>If the process does not provide the alerts to all volunteers or within five business days, answer No.</p>	<p>Yes</p> <p>No</p>

## Quality Site Requirement #5: Volunteer Agreement

Question 16 <i>Are all Forms 13615 signed and dated by the volunteer and approving official(s)?</i>	Answer Options
<p>All partners must have a process in place for the partner or partner-designated approver to sign each Form 13615 after confirming the identity of the volunteer. By signing the form the volunteer indicates they have read and understand the agreement and agree to adhere to these standards. The partner's signature validates the information on the form.</p> <p>If you are unable to verify any or all Forms 13615 while at the site, request verification from the partner. The requested information must be provided within two business days.</p> <p><b>If you answer no to this question, you MUST answer no to question 19.</b></p>	<p>Yes</p> <p><u>No</u> <u>Not signed/dated by</u> <u>volunteer</u></p> <p><u>No</u> <u>Not signed/dated by</u> <u>approving official</u></p> <p><u>No</u> <u>Unable to verify</u></p>

Question 17 <i>Were any violations to the Volunteer Standards of Conduct Identified?</i>	Answer Options
<p>Use the comments box to indicate what standards were violated, if any. See Form 13615 for the Standards of Conduct.</p> <p>If more than one standard was violated, check the box for the most egregious violation. Use the comments and remarks fields to indicate all violations identified.</p> <p><b>Note:</b> If you answer "Yes", you must initiate the Internal Referral Process by completing Form 14511. Remember the distinction between QSR noncompliance and a violation to VSC 1, <i>Follow the QSR</i>. A VSC violation relating to the QSR only occurs if the volunteer REFUSES to comply with the QSR and/or if the volunteer intentionally violates the QSR and refuses to change this behavior after being counseled. If the volunteer begins adhering to the QSR, they have not violated the the VSC.</p> <p>See the Solicitation of Donation policy and/or the Talking Points for SPEC Employees, <i>AARP Tax Aide 2015 Filing Season Procedures</i> regarding tip or donation jars.</p> <p><b>If you answer yes to this question, you MUST answer no to question 19.</b></p>	<p>No violations were identified</p> <p><u>Yes</u> <u>Violation to VSC 1</u></p> <p><u>Yes</u> <u>Violation to VSC 2</u></p> <p><u>Yes</u> <u>Violation to VSC 3</u></p> <p><u>Yes</u> <u>Violation to VSC 4</u></p> <p><u>Yes</u> <u>Violation to VSC 5</u></p> <p><u>Yes</u> <u>Violation to VSC 6</u></p>

Question 18 <i>Is VolTax information displayed at the site?</i>	Answer Options
<p>Confirm the latest version of Publication 4836, VITA/TCE Free Tax Programs, is displayed in a visible location at the site, or D143 for AARP sites is displayed in a visible location at the site.</p> <p><b>If you answer no to this question, you MUST answer no to question 19.</b></p>	<p>Yes</p> <p>No</p>



<b>Question 19</b> <b>Did the site meet the components for QSR #5?</b>	<b>Answer Options</b>
<p><b>This is the measurement question.</b></p> <p>Answer YES if:</p> <ul style="list-style-type: none"> <li>- you were able to verify all Forms 13615 were signed/dated by the volunteer/partner (Q16) AND</li> <li>-you did not identify any violations to the Volunteer Standards of Conduct (Q17).</li> <li>-you were able to confirm the site displays VolTax information (Q18).</li> </ul> <p>Answer No if:</p> <ul style="list-style-type: none"> <li>- you were unable to verify all Forms 13615 were signed/dated by the volunteer/partner (Q16) OR</li> <li>- you identified a violation to the Volunteer Standards of Conduct (Q17).</li> <li>- the site does not display VolTax information (Q18).</li> </ul>	<p>Yes</p> <p><b><u>No</u></b></p>

## Quality Site Requirement #6: Timely Filing

<b>Question 20</b> <b>Are timely filing requirements met?</b>	<b>Answer Options</b>
<p>Ask the site coordinator to explain the process used to:</p> <ul style="list-style-type: none"> <li>- transmit the tax returns (within 3 days)</li> <li>- retrieve acknowledgements (within 2 days)</li> <li>- notify a taxpayer if a reject cannot be corrected (within 24 hours)</li> </ul> <p>Ask the coordinator to explain how the site handles Form 8879. The coordinator should explain:</p> <ul style="list-style-type: none"> <li>- that the taxpayer is asked to sign Form 8879 prior to the return being transmitted and</li> <li>- that the signed Form 8879 is given to the taxpayer with a copy of their tax return.</li> </ul> <p>See Publication 3189 for additional information.</p> <p>Answer FSA Only Site if the site only offers FSA.</p> <p><b>This is the measurement question. If you answered No, the site did not meet this QSR.</b></p>	<p>Yes</p> <p><b>No</b></p> <p><b>Not transmitting timely</b></p> <p><b>No</b></p> <p><b>Not retrieving acknowledgments timely</b></p> <p><b>No</b></p> <p><b>Not notifying taxpayers of rejects timely</b></p> <p><b>No</b></p> <p><b>Form 8879 not signed, if applicable</b></p> <p><b><u>No</u></b></p> <p><b><u>Other</u></b></p> <p>N/A</p> <p>FSA Only Site</p>

### Quality Site Requirement #7: Civil Rights

Question 21 Is the current Civil Rights poster displayed at the first point of contact?	Answer Options
<p>As you enter the site, look for the civil rights poster, which should be visible at the first point of contact between the taxpayer and volunteer.</p> <p>Confirm the site is using a current version of:            -Publications 4053 ENG/SP or 5545 at VITA/TCE sites or            -D143 at AARP sites</p> <p><b>This is the measurement question. If you answered No, the site did not meet this QSR.</b></p>	<p>Yes</p> <p><b><u>No</u></b></p>

### Quality Site Requirement #8: Site Identification Number

Question 22 Is the site using the correct SIDN?	Answer Options
<p>Confirm the site is using the correct SIDN by asking the coordinator to provide the SIDN being used at the site. Review production reports prior to conducting the review for any indications that the site may be using an incorrect SIDN.</p> <p>If one computer has an incorrect SIDN, all computers must be checked. If incorrect:  <u>For networked computers:</u> Correct the SIDN on one computer (<b>Note:</b> the correction may not update computers in use when the correction is made).</p> <p><u>For non-networked computers:</u> Check the SIDN on each computer/each user name to ensure the correct SIDN is set in the defaults correctly.</p> <p>See Publication 3189 for more information regarding tax defaults.            For FSA Only Sites, confirm they are using the correct URL.</p> <p><b>This is the measurement question. If you answered No, the site did not meet this QSR.</b></p>	<p>Yes</p> <p><b><u>No</u></b></p>

### Quality Site Requirement #9: Electronic Filing Identification Number

Question 23 Is the site using the correct EFIN?	Answer Options
<p>Confirm the site is using the correct EFIN by asking the coordinator to provide the site's EFIN.</p> <p>If incorrect:  <u>For networked computers:</u> Correct the EFIN on one computer (<b>Note:</b> The correction may not update computers in use when the correction is made).</p> <p><u>For non-networked computers:</u> Check the EFIN on each computer/each user to ensure the correct EFIN is set in the defaults correctly.</p> <p><b>This is the measurement question. If you answered No, the site did not meet this QSR.</b></p>	<p>Yes</p> <p><b><u>No</u></b></p> <p>N/A FSA Only Site</p>

## Quality Site Requirement #10: Security, Privacy and Confidentiality

<b>Question 24</b> <i>Is there a process which identifies every volunteer who prepares, corrects, or changes a tax return?</i>	<b>Answer Options</b>
<p>Have the coordinator explain how he/she can identify all volunteers who assist in a tax return's preparation process. The coordinator should indicate that volunteers' access or privileges in the software are limited to their duties at the site.</p> <p><b>If you answer no to this question, you MUST answer no to question 28.</b></p>	<p>Yes</p> <p><u>No</u></p> <p>N/A</p>

  

<b>Question 25</b> <i>Are adequate security measures taken to protect electronic equipment?</i>	<b>Answer Options</b>
<p>Have the coordinator explain what steps are taken to protect the electronic equipment. If the security measures are adequate to protect the equipment and meet the guidelines provided in Publication 4299, answer Yes.</p> <p>If additional security measures are needed, answer No.</p> <p>Answer N/A if the site uses TaxWise Online in a computer lab.</p> <p>Answer N/A for FSA Only Sites.</p> <p><b>If you answer no to this question, you MUST answer no to question 28.</b></p>	<p>Yes</p> <p><u>No</u></p> <p>N/A</p>

  

<b>Question 26</b> <i>Is taxpayer information safeguarded and properly disposed?</i>	<b>Answer Options</b>
<p>Ask the coordinator to explain how they dispose of sensitive information, including Personally Identifiable Information (PII).</p> <p>See Publication 4299 for more information.</p> <p>For FSA Only Sites, ensure the cache is cleared after each taxpayer. If the site is not clearing the cache, answer No-not clearing the cache.</p> <p><b>If you answer no to this question, you MUST answer no to question 28.</b></p>	<p>Yes</p> <p><u>No</u></p> <p><u>No</u>  <u>Not clearing the cache</u>  <u>timely (FSA Only Site)</u></p>

<b>Question 27</b> <i>If Section 7216 is applicable, are consent notices properly secured and maintained?</i>	<b>Answer Options</b>
<p>Ask the coordinator if they secure Section 7216 consents. If they do, have the coordinator explain the process used.</p> <p>Sites with a relational EFIN are required to use consent notices.</p> <p>Answer N/A if taxpayer information is not used for other purposes or consent notices are not required based on the exception.</p> <p><b>If you answer no to this question, you MUST answer no to question 28.</b></p>	<p>Yes Consent notices are properly secured</p> <p>No <u>Consent notices are not properly secured</u></p> <p>N/A Consent notices are not required</p> <p>N/A FSA Only Site</p>

<b>Question 28</b> <b>Did the site meet the components for QSR #10?</b>	<b>Answer Options</b>
<p><b>This is the measurement question.</b></p> <p>Answer Yes if the site:</p> <ul style="list-style-type: none"> <li>-has a process to identify everyone involved in the return preparation process (Q24) AND</li> <li>-takes adequate security measures (Q25) AND</li> <li>-properly disposes of sensitive information (Q26) AND</li> <li>-properly secures Section 7216 consent notices, if appropriate (Q27).</li> </ul> <p>Answer No if the site:</p> <ul style="list-style-type: none"> <li>-does not have a process to identify everyone involved in the return preparation process (Q24) OR</li> <li>-does not take adequate security measures (Q25) OR</li> <li>-does not properly dispose of sensitive information (Q26) OR</li> <li>-does not properly secures Section 7216 consent notices, if appropriate (Q27).</li> </ul>	<p>Yes</p> <p><b><u>No</u></b></p>

<b>Question 29</b> <b>Are all volunteers wearing or displaying their name to taxpayers they assist?</b>	<b>Answer Options</b>
<p>Confirm all volunteers are identified.</p> <p>If one or more volunteers are not wearing/displaying their name, have the coordinator explain the process used to identify volunteers to the taxpayers they serve.</p> <p>If all volunteers are wearing or displaying their name, answer Yes. If not, answer No.</p>	<p>Yes</p> <p><u>No</u></p>

## Site Operations

<b>Question 30</b> Is the site operating information correct in SPECTRM?	Answer Options
<p>Ask the coordinator to verify days and hours of operation and language services offered. For FSV, review available Form(s) 13715, prior to going to the site to ensure partners submitted all changes to the local SPEC office for entry into SPECTRM.</p> <p>Partners can check the Site Locator on irs.gov to determine site operating information.</p> <p>If the information in SPECTRM is incorrect, answer no and instruct the coordinator to provide an updated form to their relationship manager.</p>	<p>Yes</p> <p>No</p>

## Adherence to Quality Site Requirements

<b>Question 31</b> What is the overall Quality Site Requirement Adherence Rating?
<p>Measurement of this question is based on the answers to questions 4, 8, 12, 14, 19-23, and 28. (Auto fill).</p>

## Remarks

Include any general comments and/or required comments if there was insufficient space in an individual comment field.